



Discover How Everyone Benefits From Planned Gifts.

How and why to plan a gift.

Planned or deferred giving is a commitment made now to make a gift to a charitable organization in the future, either during your lifetime or through your will. The gift may be conveyed through bequests, gift annuities, and charitable trusts of various kinds. The assets conveyed to the charity are often in forms other than cash: stocks and bonds, marketable real estate, life insurance policies, retirement funds and the like. It is highly recommended that you work closely with a financial planner to create an estate plan that meets your future intentions and current needs. Here are just a few of the options to keep in mind when creating your estate plan:

Your Goal	Your Gift	Your Method	Your Benefit
Make a gift that costs you nothing during your lifetime	Gifts Through your Will or Trust (“Bequest”)	Include a gift of cash, property, or a share of your estate through your will or trust	A gift that does not affect your cash flow, and you can adjust your gift as circumstances change
Make a gift while leaving more of your estate to your heirs	Gifts of Retirement Assets (e.g., 401-K, IRA)	Name us as the beneficiary of your retirement plan, and pass less-taxed assets to your heirs	Avoid up to 60% income tax on your retirement assets; pass more of your estate to your heirs
Make a large gift at little cost	Gift of Life Insurance	Donate a life insurance policy you no longer need or name us in an existing one	Take a tax deduction now; take possible future deductions through gifts to pay policy premiums
Plan a future gift in the simplest way possible.	Gift the balance of your account (POD or TOD)	Designate the balance of your bank or brokerage account, retirement plan, annuity or life insurance policy to go to us.	Make an extraordinary contribution that costs you nothing now and is as simple as signing your name.
Make a gift and receive a steady income for life	Charitable Remainder Unitrust, Charitable Remainder Annuity Trust	Share your assets with us in a plan that gives you an income for life and passes us the remainder	Diversify assets, avoid or defer capital gains tax, receive charitable tax deduction, secure often greater income and possible inflation protection
Make a gift and receive a guaranteed “paycheck” for life	Charitable Gift Annuity	Donate cash or securities in a plan where the remainder comes to us after your passing	Receive higher rate of return tax-advantaged payments for life, charitable tax deduction, and avoid capital gains tax
Make a gift while avoiding capital gains liability	Gifts of Appreciated Securities	Give us appreciated stocks, bonds or mutual funds to sell and use the proceeds	Make a significant gift; receive an immediate income tax deduction; pay no capital gains tax
Make a gift that preserves your assets for your heirs	Charitable Lead Trust	Use appreciating assets to create a trust that will pay us income for a period of years, and then pass the assets back to you or your heirs	Shelter your growing assets and benefit us right away; reduce or eliminate gift and estate tax

Although not required, it is strongly recommended that if you have included Stop Predatory Gambling Foundation in your estate planning that you submit the Bequest Intention Form. If you have any questions, please contact Kate Rozzi at kate@stoppredatorygambling.org.



CONFIDENTIAL Planned Giving/Bequest Intention Form

Donor Name(s): _____

Date(s) of Birth: _____

Address: _____ E-mail: _____

_____ Phone: _____

I/We have provided for the following bequest to the Stop Predatory Gambling Foundation, and, based on current estimates, believe there will be sufficient assets in my/our estate(s) to satisfy this bequest in the future. I/We may, at any time, choose to satisfy this gift intention during my life/our lives.

This statement may be altered by me/us at any time in writing. I/We intend for this statement to operate as a good faith declaration of my/our hopes and intentions, and do not intend this statement to create an obligation that is binding and enforceable against my/our estate. Should I/we change this provision in the future, I/we will notify the National Director and/or Director of Development at Stop Predatory Gambling.

Type of Bequest:

_____ Specific Dollar Amount

_____ Percentage of Residuary Estate

_____ Beneficiary Designation (e.g. retirement plan, life insurance)

Beneficiary Description: _____

_____ Specific Property (e.g. real estate address, art, collection, etc.)

Property Description: _____

Estimated Current Value of Bequest Provision: \$ _____ OR _____ %

I/we have attached a copy of the pertinent provision(s) of my/our estate plan(s)(not required but recommended).

Donor Signature

Date

Donor Signature

Date

Thank you for your generosity in making this gift.